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Subject: Strategic Planning Working Group meeting notes
Attachments: SPWG_Jan2021_Meeting_slides.pptx

Hi Kathy,

Here are some takeaways from today's Strategic Planning Working Group meeting. I can shorten for next week's David/Carol weekly, if you'd like.

Update on A-11 Guidance as it pertains to Strategic Planning

- Dustin gave a detailed overview at the PIO Council meeting, so OMB kept points brief
- December memo sought to reduce burden; though GPRMA is fairly prescriptive and A-11 seeks to explain and provide consistency across agencies
- January 15 memo clarified that deadlines outlined in Part 6 still stand, including Strategic Planning milestones, like the June 4 submission of the Goal/Objective framework
- Part 230/Strategic Planning did have valuable info not in GPRMA, such as key interim steps in the process, what makes a good strategy, stakeholder engagement, etc.
- Consensus from the PIOs was to re-instate the Part 6 guidance, and explore ways to create more flexibility to make the products more meaningful in practice
- Two APG limit- need to wait and see if this cap will stand (Part 6 said 2-8 APGs)

Stakeholder Engagement: Benefits and Who to Involve

- Discussion focused on multiple types of stakeholders: internal: political leadership, career leadership, other internal agency participants, external groups, and Congress
 - OMB noted that GPRMA states Congress wanted to be engaged early vs at the end
- Benefits: build trust, early warning of risks, accountability and transparency, identify wide range of needs, among others
- Multiple polls on who does what when re: internal, external and Congress; before/after June 4 deliverables (range of answers; I can provide data if you are interested)

Examples from Agencies

NASA

- Has a Council System to engage leadership at various levels and frequency
- Executive senior leadership council must approve the Strategic Plan (in their charter)
- NASA told Biden Administration not making sea changes to key work areas; currently has one political in-place

SBA

- Heard new administration will not significantly change priorities of agency, though SBA focused heavily on Covid-19 and CARES Act this past year and will continue to adjust to these
- Uses a senior leadership steering committee (career leaders, I believe)
- Uses a stakeholder list, and engages with a subset, informed by offices, in Plan development early in process
- Employs focus groups from their HQ office, field offices
- Leverages regular senior leadership meetings to keep leaders informed during plan development, frequently
- Draws from Strategic Reviews so Plan uses leaders own words re: accomplishments, opportunities, and risks; helps with buy-in and offices owning the goals and objectives
- Uses Excellence in Government Fellows to do outreach to community/external stakeholders

- Strategic Plan team works closely with Evidence Act team on stakeholder engagement

Treasury

- Goal of Strategic Plan is useful decision-making for leadership and staff
- Before election, outreach to career leadership; post-election- engages political leadership
- Assess both campaign platforms, so are ready to go in either direction
- Now, using Yellen speeches, nomination statement to understand priorities
- Targets Congressional committees and requests feedback on current Plan to help inform new Plan
 - Asks what's mission, areas of opportunity for inter-agency engagement/collaboration
 - Then, present to political leadership
- Possible opportunities for cross-government planning:
 - Recovering from pandemic
 - Rebuilding the economy equitably
 - Combatting climate change
 - Re-engaging allies and protecting national security